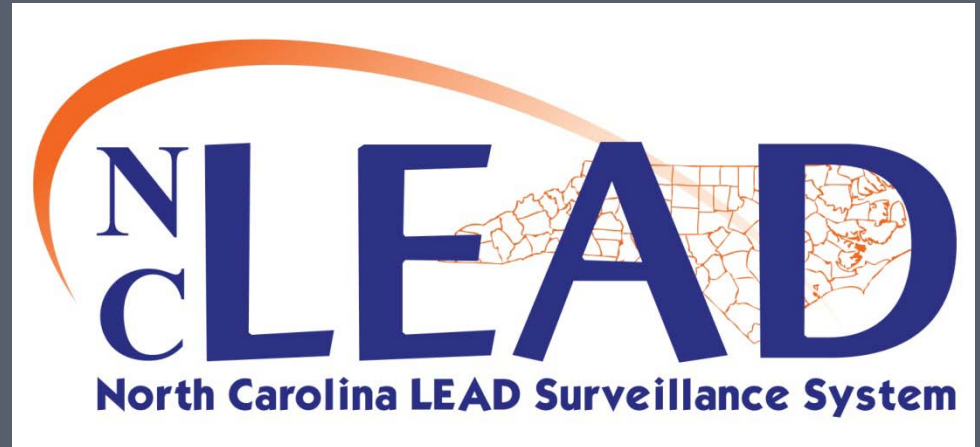
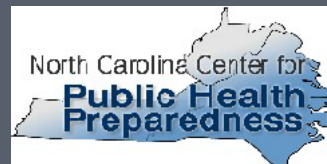




NC LEAD REFRESHER TRAINING 2010 *REVIEW OF THE BASICS*



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Webinar Overview

- Approximately 90-minutes
- 10 minute welcome and review of CEHB NC Lead website
- 30 minute review of basic NC Lead system features (for both clinicians and environmental health specialists)
- 10 minute Q & A
- 30 minute review of environmental health specific NC Lead system features
- 10 minute Q & A

Information about NC Lead

- CEHB website

- http://www.deh.enr.state.nc.us/ehs/Children_Health/NCLEAD/nclead.htm

- You can also “Google” “NCLEAD” to find this website

- Website contains NC Lead training opportunities, help desk info, and several resource documents
(also distributed at training)



Logging in to NC Lead

- Use your Login Name and Temporary Password
(given to you at classroom training)
- You will be automatically prompted to change your password *(requirements can be found in User Manual)*
- Go to the  User Information icon on toolbar
 - Set up your security Q & A
- You will receive email prompts to reset your password approximately every 90 days

Types of Events

1. Child Event

- ❑ *Electronically created every time a child has first blood lead test*
- ❑ *Any address within a Child Event is considered a Site Address*

2. Property Event

- ❑ *Manually created by EH users when there is an environmental activity conducted on a site address*
- ❑ *Only a small subset of Site Addresses become Property Events*



The Dashboard

□ 3 sections:

1. *Toolbar* (contains icons of various system features)
2. *Event Summary* (contains a basic overview of event, e.g., Event “type”: Child or Property, Create Date, Investigation Status: Open vs. Closed, Notes, etc.)
3. *Event Information* (contains various tabs where user will enter or review information about the event, e.g., Event Data, Lab Results, Concerns, etc.)



3 icons to open events

1. Recent Events icon



2. Search Event icon



3. Workflows icon





Searching for a Child Event

- Click on Search Event icon in toolbar
 - ▣ Enter search criteria
 - Use asterisk(s) *
 - Best to begin with a broad search and then narrow the search if too many results appear
 - If child or property event is located, click “Use Selected Party” button to load event on Dashboard
 - *If child event is not located, the child could still be in NC Lead, but reside in another county. Proceed by searching for the child independently of the event.*
 - *If the property event is not located, proceed to create one.*



Searching for a Child (in another county)

- Click on Create Event icon in toolbar 
 - ▣ Select “Blood Lead – Child” for the Event Type
 - ▣ Click on the “Select Person” button.
 - ▣ Enter search criteria
 - Use asterisk(s) *
 - If the child is located, note the city
 - Call nurse at that city’s LHD, e.g., if child lives in Durham County, call Durham County Health Department’s lead nurse
 - Ask other county to share the event with your county group (e.g. Wake County Clinical) if you need access to it



Workflow Queues

- Workflows are the main way you will manage your events in NC Lead
- Use your Workflow Guide/Cheat Sheet handout to help you:
 - ▣ Understand why an event is in a specific workflow
 - ▣ How to get an event out of a specific workflow
 - ▣ How often the workflow refreshes or updates



Diagnostic Testing Needed Workflow

Why event is in workflow	When event leaves workflow	Refresh rate
• Last test result ≥ 10, not a confirmed EBLL, and not a CLP <u>or</u> • Last test result ≥ 20 and not a CLP	• Child is a CLP <u>or</u> • Child is a confirmed EBLL and last test result < 20) <u>or</u> • Child is not a confirmed EBLL, not a CLP and last test result < 10	30 minutes



Lab Results

- Child Blood Lead Level lab results are *electronically* entered in a Child Event in NC Lead
- Environmental and Water lab results are *manually* entered by an EH user in a Property Event in NC Lead
- A few ways to view lab report results:
 - ▣ *Lab Results Tab* (Event Information section)
 - ▣ *Administrative Question Package* (Event Information section → Event Data Tab)
 - ▣ *Reports* (icon on toolbar) 



Administrative Question Package (Child Event)

- *Administrative Question Package* is reviewed and edited by both clinicians and environmental health specialists
 - ▣ “Add New” hyperlink allows for more than one environmental investigation offer to be noted
- *Environmental Follow-Up Wizard* (for EH users only)
 - ▣ Simplified way for EH users to view fields from the Administrative Question Package that are solely relevant to environmental activities



Addresses in a Child Event

- Edit or add site addresses on the Edit Person screen
 - 2 ways to get to Edit Person screen
 1. Click on *Persons Tab* in the Event Information section
 2. Click on the *Edit hyperlink* in the Address row in the Event Summary section
- Add a mailing address in the Demographic Question Package (if differs from home address)

Edit Address

- Click “Edit” or “Edit Address” when you find out child has moved, is attending a new school, etc.
- Once you are on the Edit Person screen, scroll to the bottom of page to find the Edit Address table
 - ▣ Make note of the “Address Type” (e.g., Home, Home (Secondary), Church, etc.)
 - ▣ Change the start date to reflect the date the child moved or address changed (if known)
 - ▣ Type over the street/city/zip code address information to reflect the new address. Click Save.

Add Address

- Click “Add address” button when you have another type of address to add, e.g., school, church, etc.
- 2 places to find “Add Address” button
 1. Event Information → Persons Tab → Address Information (sub tab) → click “Add Address” button
 2. Event Information → Persons Tab → click “Edit” button → click “Add Address” button
- Make note of the “Address Type” (*be sure to select the new type you wish to add*)



Print Documents / Attaching a file

□ *Example documents*

- Event Print: Summary of Event (*Child and Property Events*)
- Form 3651 – Child Evaluation (*Child Event only*)
- Form 3460 – Environmental Investigation for Lead Hazards (*Property Event only*)

□ *How to use a print document:*

- Open document
- Save document on your computer
- Edit and resave document
- Attach and/or mail document
 - Can print on your LHD letterhead



Sharing an Event

- Check *Shared Events* workflows regularly
- To share an event with another county:
 - ▣ Click on Share Event icon 
 - ▣ In “Add Case Share” table:
 - Type = “View” or “View & Update” (Limited or Full)
 - User Group = Durham County Clinical
 - Allow Delegation = x (allows Durham County Clinical to share with other groups)
 - ▣ Add a note on dashboard stating why event was shared



NC Lead Resources

- CEHB website for NCLEAD

[http://www.deh.enr.state.nc.us/ehs/Children Health/NCLEAD/nclead.htm](http://www.deh.enr.state.nc.us/ehs/Children_Health/NCLEAD/nclead.htm)

- Refer to your training materials

- ▣ *User Manual from Consilience Software*

- ▣ *Exercise Packet (stapled handout)*

- ▣ *Blue Folder handouts*

- Email or call the NC Lead Help Desk:

NCleadhelp@lists.ncmail.net or 1-888-251-5543



Environmental Health Users

- *Additional concepts or skills to understand:*
 - ▣ How to manage Environmental Health workflows
 - ▣ Site Address vs. Property Event
 - ▣ How to search for and/or create a Property Event
 - ▣ What information to enter in Property Event - Question Packages
 - ▣ How to link Property Event to Child Event
 - ▣ How to manually enter environmental and water lab results



Environmental Health Workflows

Environmental Health

1. Children with EBLLs in need of environmental follow-up
2. Children with CLPs in need of environmental follow-up
3. Active Property Investigations
4. Remediation Incomplete

Abandonment Monitoring

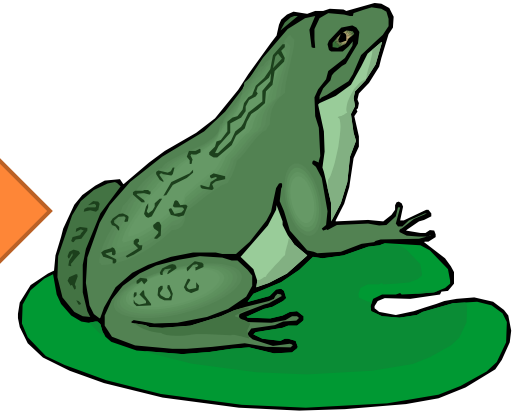
Properties Due for Annual Monitoring

**See Quick Reference Guide handout for details about each workflow*

Site Address vs. Property Event



Tadpole becomes a frog when it breathes air and grows legs.



Site Address becomes a Property Event when it is investigated or another activity is performed.





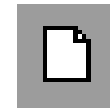
Searching for a Property Event



- Click on Search Event icon in toolbar
 - ▣ Enter search criteria
 - Use asterisk(s) *
 - Best to begin with a broad search and then narrow the search if too many results appear
 - If property event is located, click “Use Selected Party” button to load event on Dashboard
 - *If the property event is not located, proceed to create one.*



Creating a Property Event



- Click on Create Event icon 
 - ▣ Select “Property” for the Event Type
 - ▣ Click on the “Select Site” button
 - ▣ Enter search criteria
 - Use asterisk(s) *
 - If the site is located, click “User Selected Party” button to transfer address onto Create Event screen
 - ▣ Click Save
 - ▣ Property Event is now open on Dashboard



Open vs. Closed Property Events

- Most Property Events that already exist in NC Lead will have a “Closed” Investigation Status
 - ▣ Only State Users can “Close” events
- Why would a Property Event be “Closed”?
 - ▣ Investigation + no hazards + notices sent
 - ▣ Abated and passed clearance
 - ▣ Demolished
- LHD users cannot edit an event that is “Closed”
 - ▣ Use the “Edit Event Properties” button to change the Investigation Status to “Open”



Question Packages in Property Event

- ☐ Property Information
- ☐ Environmental Activity
- ☐ XRF Readings
- ☐ Remediation



How to link Property Event to Child Event

- Occurs within Environmental Activity QP
- Enter Environmental Activity Date
 - ▣ Select “activity” type
 - ▣ Does this activity also serve as an investigation/attempt for a child?
= YES
 - ▣ First Child's Name
 - Search for child event in NC Lead
- Click Save
- Linked child event appears on Dashboard in Event Summary section; Additional Information row



Manual Entry of Lab Results and XRF Readings

- For the time being, environmental lab results need to be manually entered into NC Lead. They are not being fed into the system electronically yet.
- Water lab, required to enter
- Environmental labs, required to enter:
 - ▣ Highest *soil* result
 - ▣ Highest *paint chip* result
 - ▣ Highest *dust (window well)*
 - ▣ Highest *dust (window sill)*
 - ▣ Highest *dust (floor)*
- XRF readings, required to enter *highest paint reading ONLY*



NC Lead Resources

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- Refer to your training materials

- ▣ *User Manual from Consilience Software*

- ▣ *Training Workbook with environmental scenarios*

- ▣ *Blue Folder handouts*

- Email or call your Regional EHS

- Email or call the NC Lead Help Desk:

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